[ADMIN PANEL]
USER GUIDE

Section 6 v13.11.01

DECK Monitoring

Section 6

Contents

Other Features Found in Global Navigation

Other Sections

Other Features Found in Global Navigation

- Account Settings
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- Support Resources
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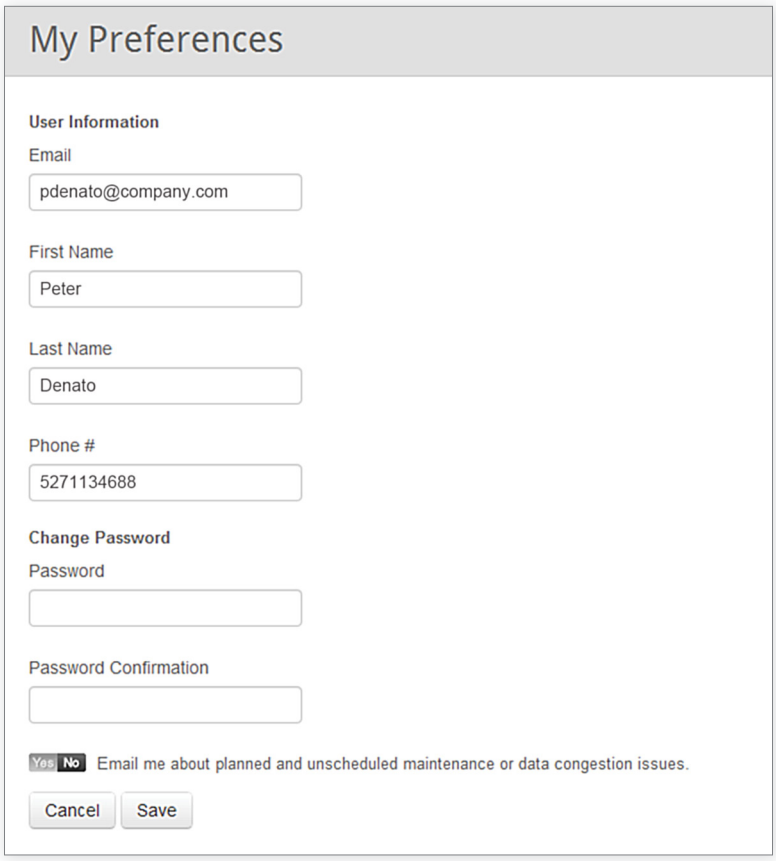
DECK

"My Account" Settings

This page allows you to edit the following personal user settings:

- User Name
- User Email
- User Phone
- User Password
- Opt in/out for application performance updates



User Management Settings

The fully customizable User Management Settings interface gives you the power to create a range of permission profiles for all the various users who may require access to parts of your Admin Panel. This feature allows you to designate Access Groups who will be able to log into your Admin Panel, but who will have restricted permissions regarding the locations and information they can view, as well as the settings and controls they can alter.

The screen grab below shows the default Access Groups you will see in your User Management Settings page. You may either edit these default profiles to fit your needs, or you may create new Access Groups of your own.

Groups

Name	Users	Locations	Alarms	Notes	Settings	Overview	Analytics	Downloads	Logistics	Statistics	Reporting	Billing	Display Management	Virtual Devices	
Full Access		All	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	Edit
Limited Access		All				✓	✓	✓	✓	✓	✓		✓	✓	Edit
Support Access		All													Edit

Create New Access Group

Default DECK Access Groups

Full Access

- Ability to see all monitored locations in Systems View pages (includes map page, Classic Solar Statistics, and Fleet Management Tables).
- Ability to access all pages in Global Views, System Views, and Settings. Ability to change settings and controls on any Admin Panel pages.

Limited Access

- Ability to see all monitored locations in Systems View pages (includes map page, Classic Solar Statistics, and Fleet Management Tables).
- Limited ability to access pages in Global Views, System Views, and Settings: no access to Alarms Pages, Settings Pages, Notes or Billing.

Support Access

- Ability to see all monitored locations in Systems View pages (includes map page, Classic Solar Statistics, and Fleet Management Tables).
- No access to pages in Global Views, System Views, and Settings. No ability to change settings and controls on any Admin Panel pages.

One of the most common uses for the Access Groups feature is to create Group profiles with access to only one (or a few) system location(s). There may be occasions when you will want to provide Admin Panel access for one of your customers to see their location(s) only; this feature allows you to block access to all other locations in your full project portfolio.

Use this tool to provide limited access for any combination of O&M providers who need to manage just one or more locations within your full project portfolio.

The screen grab below shows a typical User Management configuration for a customer with multiple project locations in the Admin Panel:

DECK

Map | Solar Statistics | Global Views | Support | Account

User Management

Groups

Name	Users	Locations	Alarms	Notes	Settings	Overview	Analytics	Downloads	Logistics	Statistics	Reporting	Billing	Display Management	Virtual Devices	
Full Access	Peter Denato, William Sanford, Theresa Becker	All	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	Edit
Limited Access		All				✓	✓	✓	✓	✓	✓				Edit
Support Access	Black, Timothy	All													Edit
Sharing AMSI Center with Rafael DeSouza	DeSouza, Rafael	AMSI Center				✓	✓	✓	✓	✓					Edit
Sharing Birch Community College with Rafael DeSouza	Peterson, Karen	Birch Community College				✓	✓	✓	✓	✓					Edit
Sharing Branch Farms Field Array with Adam Blount	Blount, Adam	Branch Farms Field Array				✓	✓	✓	✓	✓					Edit
Sharing Gellen Center with Arthur Wells	Wells, Arthur	Gellen Center				✓	✓	✓	✓	✓					Edit

Create New Access Group

Users

Name	Access Groups	Customer Permissions	Email	Edit	Remove
Denato, Peter **(admin)**	Full Access	✓	pdenato@company.com	Edit	--
Sanford, William **(admin)**	Full Access	✓	wsanford@company.com	Edit	Remove
Becker, Theresa **(admin)**	Full Access	✓	tbecker@company.com	Edit	Remove
DeSouza, Rafael	Sharing AMSI Center with Rafael DeSouza	✓	rafael@amsicenter.com	Edit	Remove
Peterson, Karen	Sharing Birch Community College with Karen Peterson	✓	kpeterson@birch.edu	Edit	Remove
Blount, Adam	Sharing Branch Farms Field Array with Adam Blount	✓	adam@flareenergy.com	Edit	Remove
Black, Timothy	Support Access	✓	tim_black@codeworx.com	Edit	Remove
Wells, Arthur	Sharing Gellen Center with Arthur Wells	✓	wells@gellencenterla.com	Edit	Remove

Add new user

Here you can add a new user to one of your company's groups. If, for example, you add them to a group that has "All Locations" and "Admin Access" selected, they will gain full access to all your company's locations.

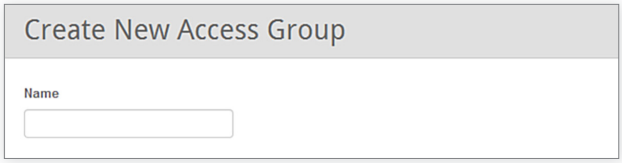
Email Address | Full Access | Invite

- Note that 3 users are part of the Full Access group. These are likely all employees of the organization that has developed this portfolio of projects. You may designate as many users as you like to have full access to all locations in your project portfolio.
- One individual has been designated for Support Access to all locations. This could be a junior staffer with the developer who is charged with the task of periodically checking over the project portfolio to look for triggered alarms or other performance issues. This individual does not have the ability to access Admin Panel features beyond a few portfolio overview pages, nor can he change settings.
- There are 4 users shown below with access to one site only. These may be O&M providers with contracts to service a single site within your project portfolio. As an Admin Panel administrator, you must create a separate Access Group for each occasion requiring limited location access in your Admin Panel (of course, after you have created a special Access Group for one or more locations, you can add as many users as you like to that group).

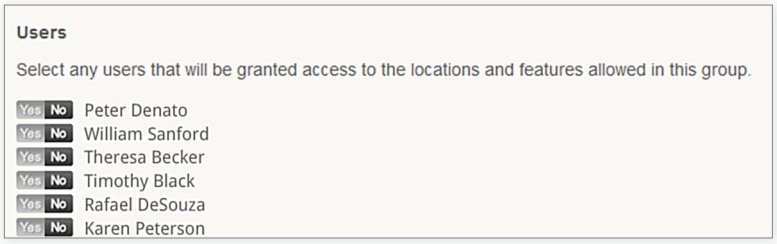
Creating New Access Groups

Clicking the button to "Create New Access Group" opens a series of Group customization fields. These fields allow you to create Groups that best serve your specific needs in each case.

Name: Give your Group a name that will be easy to recognize, and that will clearly explain the unique function of the Group.

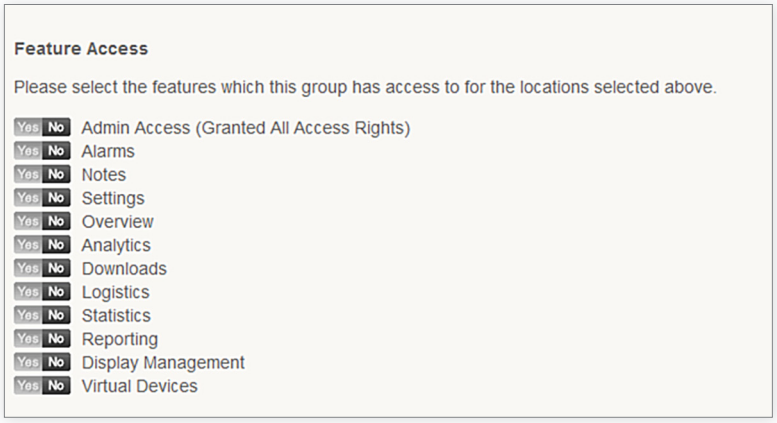


Users: The DECK application will automatically load the names of all registered users for your Admin Panel (even if they only have access to one system). Click "yes" next to the name for all individuals you want to include in your new group.

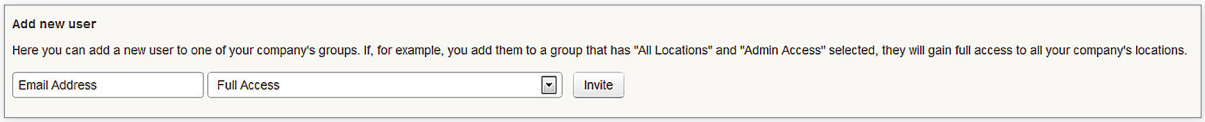


If you want to add a user to your new Group, but you don't see them on this list, you will first need to upload their information using the "Add New User" fields on the User Management page view.

Feature Access: These fields allow you to cherry pick the features that your new Access Group will be able to access in your Admin Panel. Note that selecting "Admin Access" will automatically grant access to all the feature sets on the list.



Add New Users



Find the fields to add new users under the User list on your User Management page view. Select one group as an initial assignment for your new user, then click the button to "invite." Your new user will receive an email invitation that allows him or her to create a login profile to your Admin Panel.

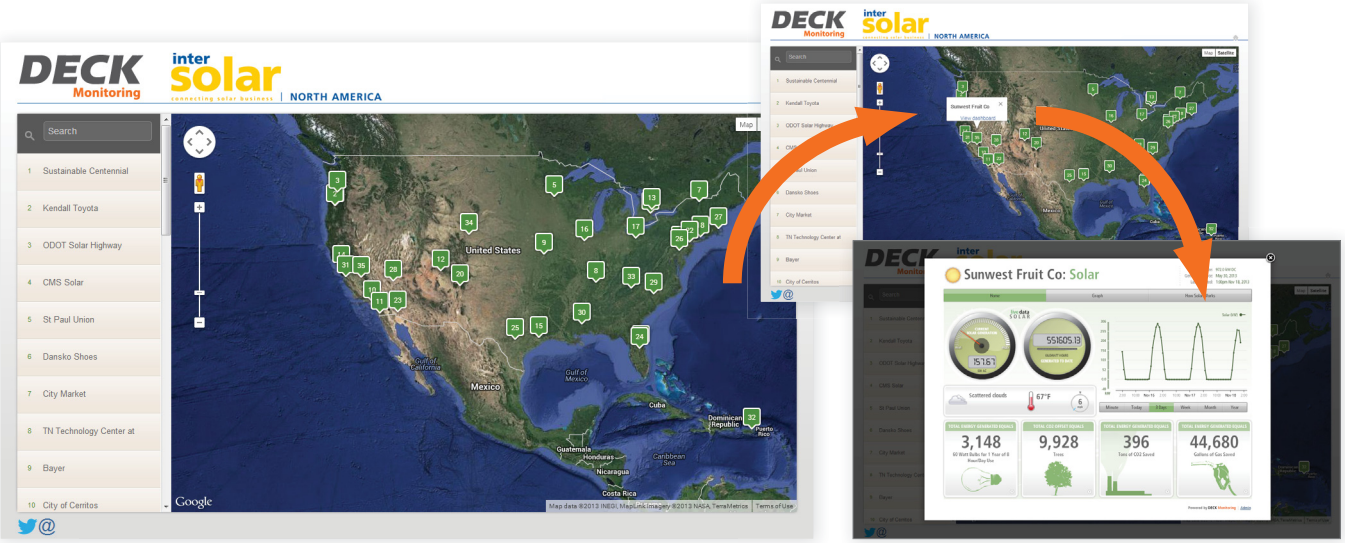
Display Management Settings

This page provides the opportunity to create a Portfolio Dashboard for two or more systems from your full portfolio. You may select a group of systems from your portfolio to display on one single public-facing web page. Portfolio Dashboards are ideal when you have a customer eager to promote several projects with one web display. These dashboards are also a great tool for developers who wish to display their full portfolio of system dashboards for new customers as part of the sales process.

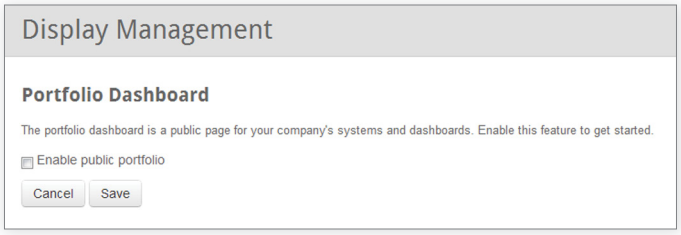
The Portfolio Dashboard shows all selected systems in a map view resembling the Admin Panel map page. All selected systems appear as pins on your map, and they are listed in column form on the left side of the map. Because the Portfolio Dashboard is intended for public viewing, however, the system pins in this map do not reveal the current alarm status for your systems.

Clicking on a system pin in a Portfolio Dashboard triggers a pop-up window with the full name of the system and a link to open the unique dashboard for that system. Clicking that link will open the system dashboard within the pop-up window:

Portfolio Dashboard Example



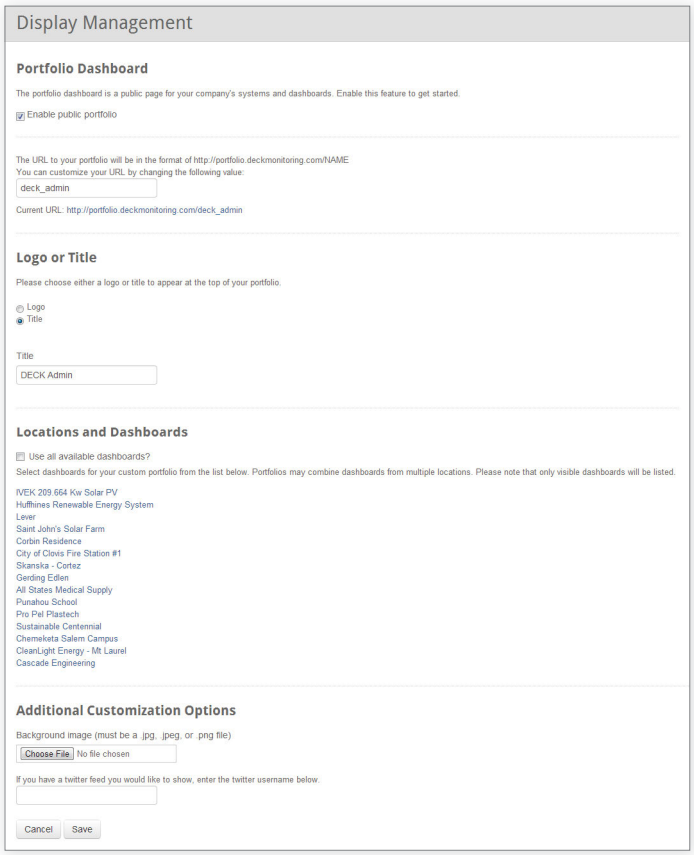
The first thing you will see when you access your Display Management page is the following field to enable a Portfolio Dashboard. Check the box to enable public portfolio, then click "save" to proceed.



Clicking through takes you to the settings page for a Portfolio Dashboard.

This page provides the following customizable options for your Portfolio Dashboard:

- **Customize URL**
  Your dashboard URL will begin with the following: "http://portfolio.deckmonitoring.com/". By default, the DECK application will add your account name to the end of this chain to form a full URL for your portfolio dashboard. If you would like the end phrase of your URL to differ from your account name, use the field here to change it.
- **Logo or Title**
  Here you can choose content for the header area at the top of your Portfolio Dashboard page. Choosing "Title" triggers a field where you can enter the name for your Portfolio Dashboard. This title will appear in gray in our standard font. Choosing "Title" means that you will not be able to upload a logo image file into your page header area.
  Choosing "Logo" triggers a field where you can upload an image file of your logo that will be placed at the top of your Portfolio Dashboard page. Please note that your logo will appear at a fixed height of 50 pixels; it is not possible to enlarge your logo file beyond that size. Choosing "Logo" means that you will not be able to enter a text title for your page.
- **Locations and Dashboards**
  Here you should see a list of every system in your portfolio. Select the systems you want to include in your Portfolio Dashboard. Please note that you must include at least 2 systems in a Portfolio Dashboard.



Additional Customization Options

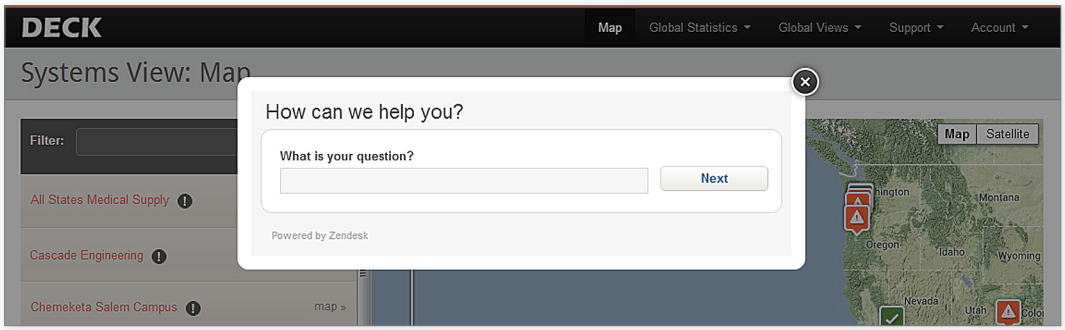
- **Background Image**
  You may choose a background image to appear behind the map on your Portfolio Dashboard page.
  Please note that your background image will be stretched as your Portfolio Dashboard is viewed on displays with varying size and aspect ratio. For this reason we advise against including type elements in a background image. For best results, your background image should be sized no smaller than 1200 x 800 pixels.
- **Twitter Feed**
  You may also enter a twitter username to create a link for your twitter feed. Twitter links will appear at the bottom of your Portfolio Dashboard page.

Support Resources

DECK Monitoring is an industry leader for helpful support resources online. The Support section in your Admin Panel contains a huge range of documents, videos, and tools such as Live Support and our Granular Decision Guide.

Live Support

The first option in your Support drop-down menu is "Live Support." Clicking Live Support triggers the pop-up window seen below:



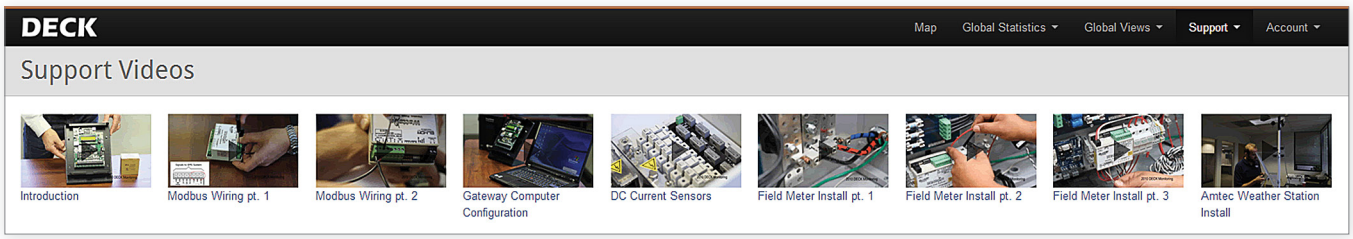
This window gives you the option to begin a live web chat with one of our support technicians on any support-related topic. Enter your question in the blank field, then click "next" to begin your live chat.

Live Support is available M – F from 9:00am to 8:00pm Eastern (6:00am to 5:00pm Pacific).

Support Videos

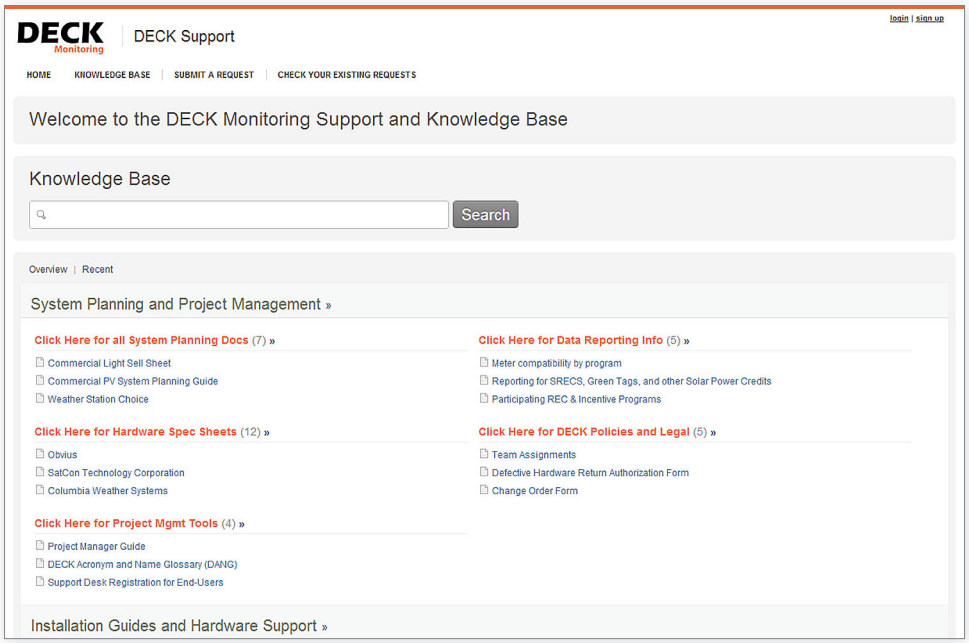
Your second option in the Support drop-down menu is Support Videos. Here you will find a range of video tutorials for various tasks associated with the monitoring installation process. Topics include:

- Modbus wiring
- Installation and configuration for AcquiSuite gateways
- Installation for meters
- Installation for weather stations
- Installation for DC current sensors



Support Documents

Clicking on Support Documents in your Support drop-down menu navigates you to our Support Desk document library, shown below.



Our Support Document library is organized into 5 top-level categories:

- **System Planning and Project Management**
  These are documents that you will find useful as you plan, purchase, and deploy your DECK Monitoring system. Topics covered here include sales documents and planning guides, hardware spec sheets, project management guidelines, DECK policies and legal, and information about third party data reporting services from DECK.

- **Installation Guides and Hardware Support**
  These are how-to guides relating to physical installation of monitoring hardware. Articles here include DECK publications as well as documents from device manufacturers.

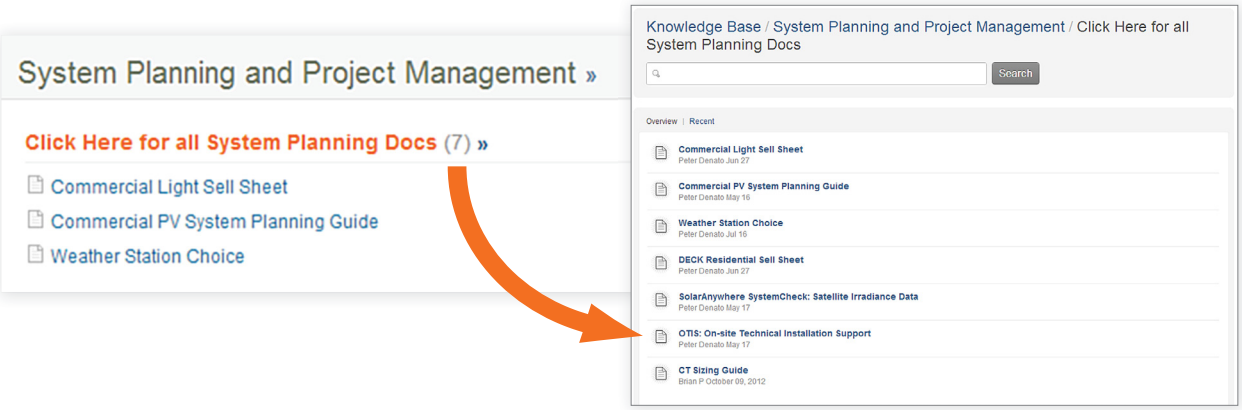
- **Software User Manuals and Software Support**
  In addition to DECK application user manuals, this section also contains set-up and configuration instructions for our software, as well as documentation about our API.

- **System Maintenance and Troubleshooting**
  Here you will find troubleshooting resources, as well as warranty and return policies for hardware devices sourced by DECK Monitoring.

- **Newsletter Archive**
  This section contains archived articles from our monthly newsletters.

Note that many topic categories in orange show 3 listed articles below. In most of these cases, there are more than 3 articles included in that category! (Our document library platform does not support more than 3 listings for each topic category.)

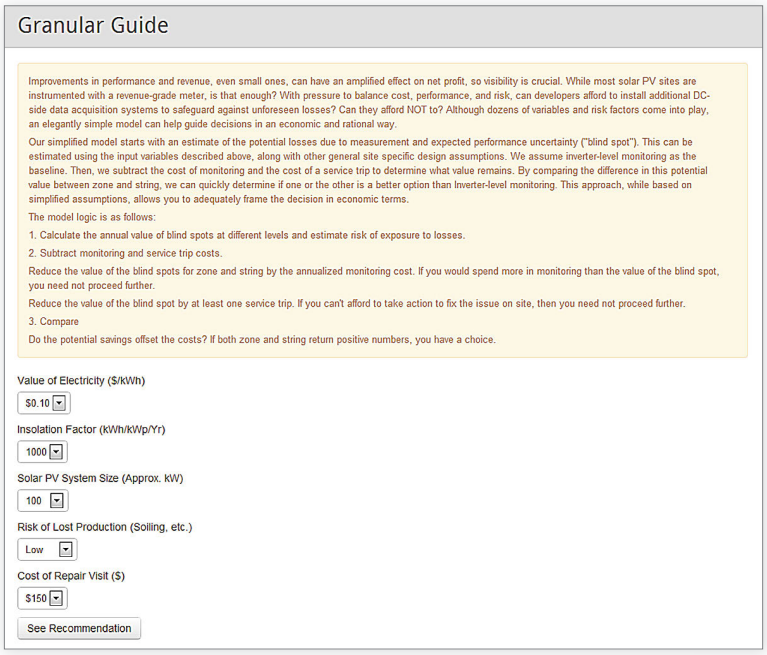
The small gray number next to each orange category title shows the number of articles in that section. So, in the example below, the category titled "Click Here for all System Planning Docs" includes 7 articles.



Clicking on any orange category title opens that section, allowing you to see all articles in the category. Then click on any article name to access that content.

Granular Decision Guide

DECK customers may choose to add DC-side data collection to their monitoring packages, enhancing the "granularity" of reporting data across their array. DC-side monitoring options include sub-array level monitoring (more granularity), and string level monitoring (most granularity). The DECK Granular Decision Guide helps customers decide which level of granularity makes most economic sense for a given PV system: string level monitoring, sub-array level monitoring, or no DC-side monitoring at all.



This proprietary DECK tool can be found as "Decision Guide" in the Support drop-down menu. The Granular Decision Guide puts a dollar value on various production loss scenarios, and compares those totals against the combined costs of monitoring upgrades and site visits necessary to identify and correct performance issues in your PV system. This tool provides a granular monitoring recommendation for your system based on the delta between potential economic loss and the hard costs of monitoring and service trips to site.

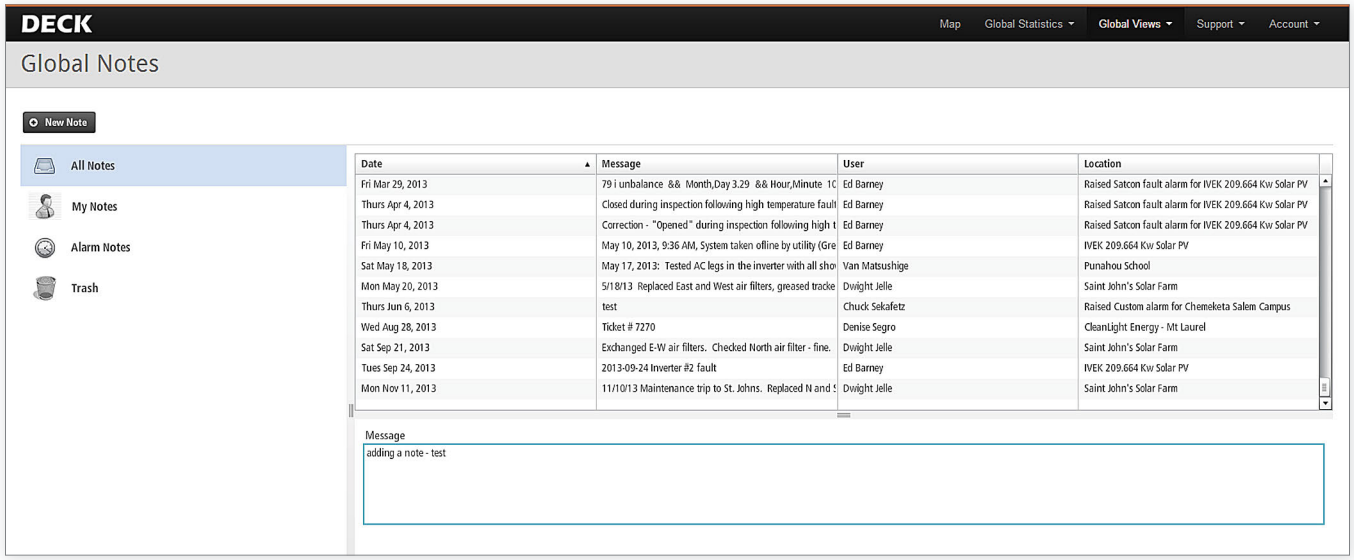
Simply add values into the 5 content fields here, then click "See Recommendation" to get your personalized Decision Guide results. For more information on the DECK Granular Decision Guide, click here.

Global Notes

The **Notes** feature is an important tool for communication about your energy systems. Here you can post notes that will be seen by designated Admin Panel Users with access to Notes. Users utilize the Notes feature for a variety of common system management tasks including:

- Reminders for scheduled system maintenance needs
- Attach explanationzs to triggered alarm events
- Share results of service visits to site

Like Alarms and Analytics, you may access Notes for all systems in your portfolio by choosing "Notes" from your Global Views navigation drop-down menu. Or you may access Notes specific to any single system by choosing "Notes" from your System Navigation options.



By default your notes will be shown in chronological order, with the most recent note first. However, by clicking on the other three categories — "Message," "User," and "Location" — you can change the order of your notes for quick searching and sorting.

In the left panel you can choose whether to see all notes, notes created by you, or notes created in response to triggered alarms.

To create a new note, click the button labeled "New Note" in the upper left corner of this screen.